



# Incremental Group

TUC Digital Webinar

Microsoft partner

2022/2023  
**INNERCIRCLE**  
for Microsoft Business Applications

Microsoft  
Partner

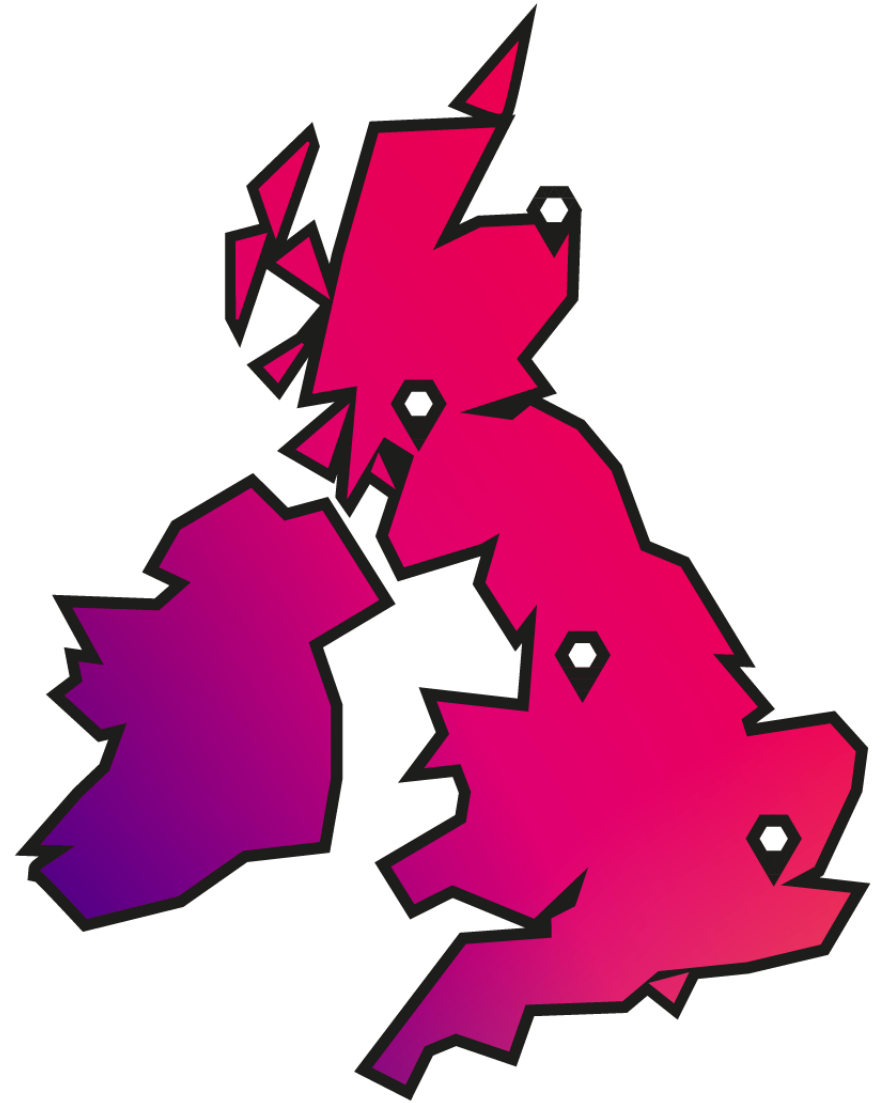


Gold Enterprise Resource Planning  
Gold Cloud Customer Relationship Management  
Gold Application Development  
Gold Cloud Productivity  
Gold Cloud Platform  
Gold ISV  
Gold Data Analytics  
Gold Data Centre  
Silver Collaboration and Content  
Silver Cloud Business Applications  
Silver Small and Mid Market Cloud Solutions

## UK wide

We have over 300 Incrementalists, in offices across the UK.

- Aberdeen
- Glasgow
- Manchester
- London



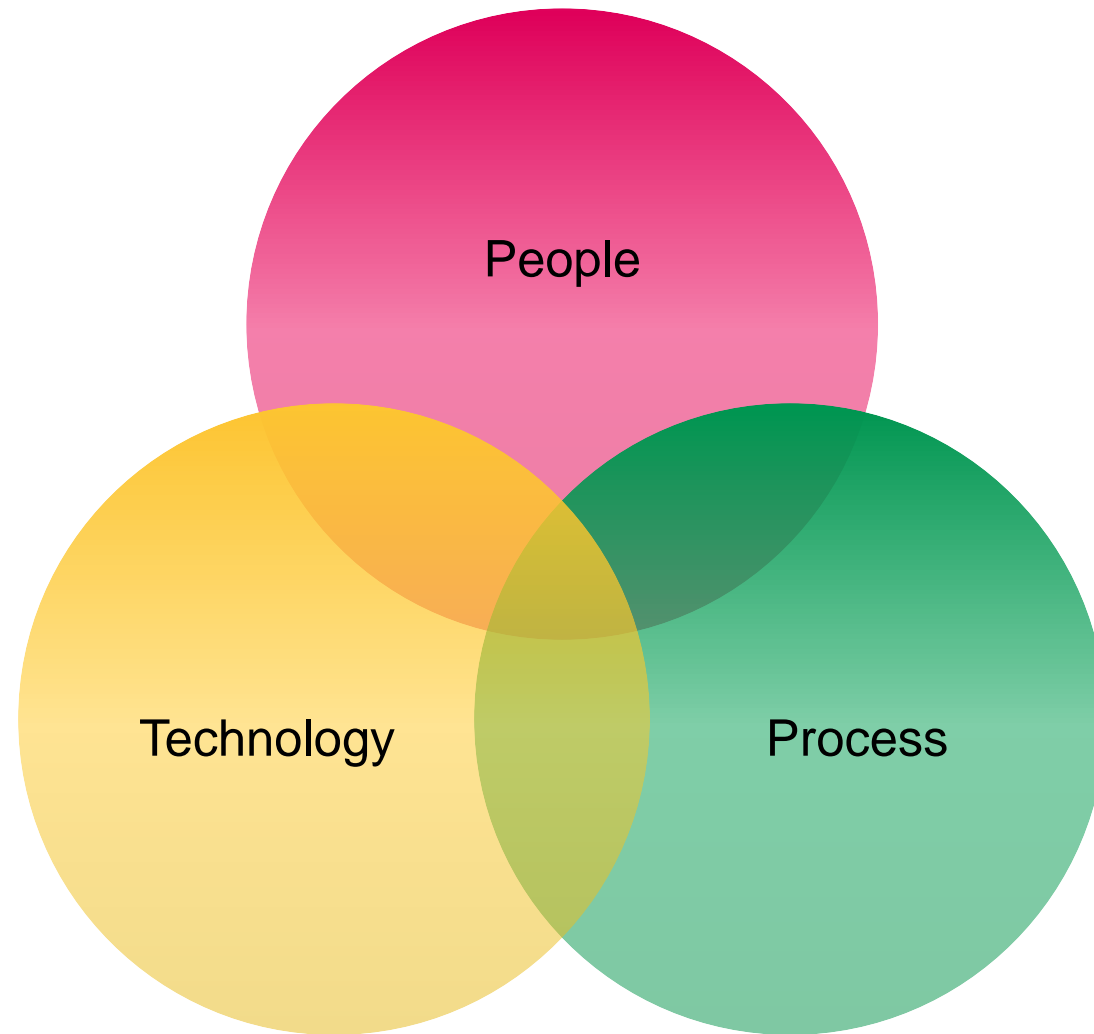
## What sets us apart?

- ▶ We are a one-stop shop for all things Microsoft and more
- ▶ We are in it for the long run
- ▶ We are dedicated to quality
- ▶ Scalability and flexibility

# Methodology

How a single team is formed across organisations

# Key success factors



# Approach



Close collaboration across organisations

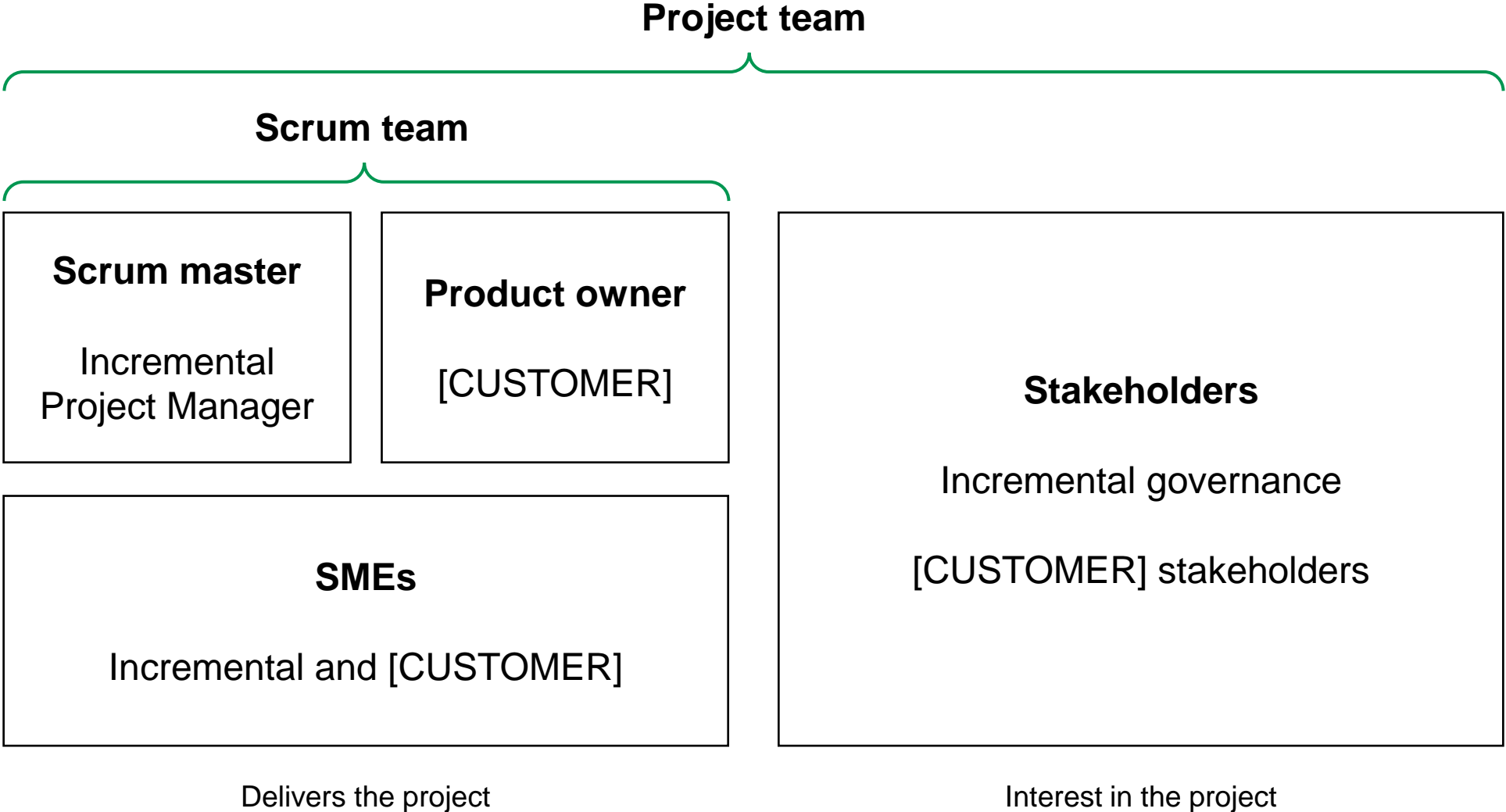


Frequent delivery of demonstrable outcomes



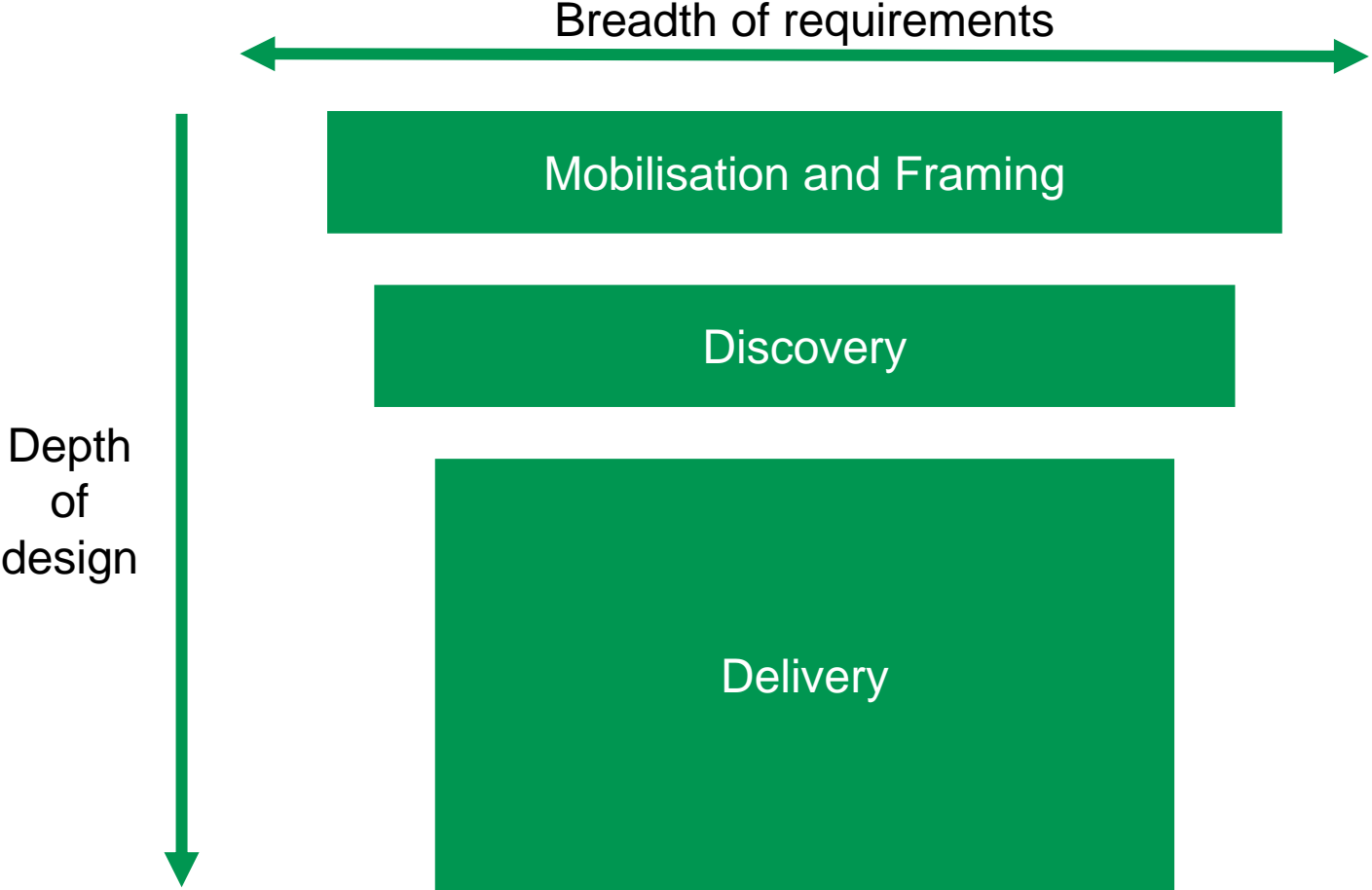
Application of best practice

# Team





# Success by Design

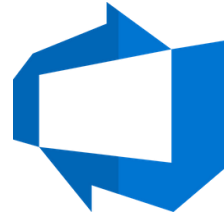


# Tools

## miro

### Miro

- Online collaborative whiteboard
- Enables and improves remote collaboration
- Run remote workshops, meetings and design sessions.



### Azure DevOps

- Plan smarter, collaborate better, ship faster
- Modern development services
- Requirements, code, bugs, test and continuous delivery.



### Power BI

- Incremental provide advanced and insightful project reports
- Uses Azure DevOps data to enable transparent, coherent understanding of project state.



### Microsoft Teams

- Shared cross-organisational team site
- Empowers informal collaboration and communication, formal meetings, and production of documentation.

# **Why Dynamics?**

Why choose Dynamics as your platform for digital transformation?

# Why choose Dynamics?



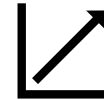
Cloud-based solution



Comprehensive functionality



Integration and scalability



Enhanced productivity and collaboration



Flexible and customisable

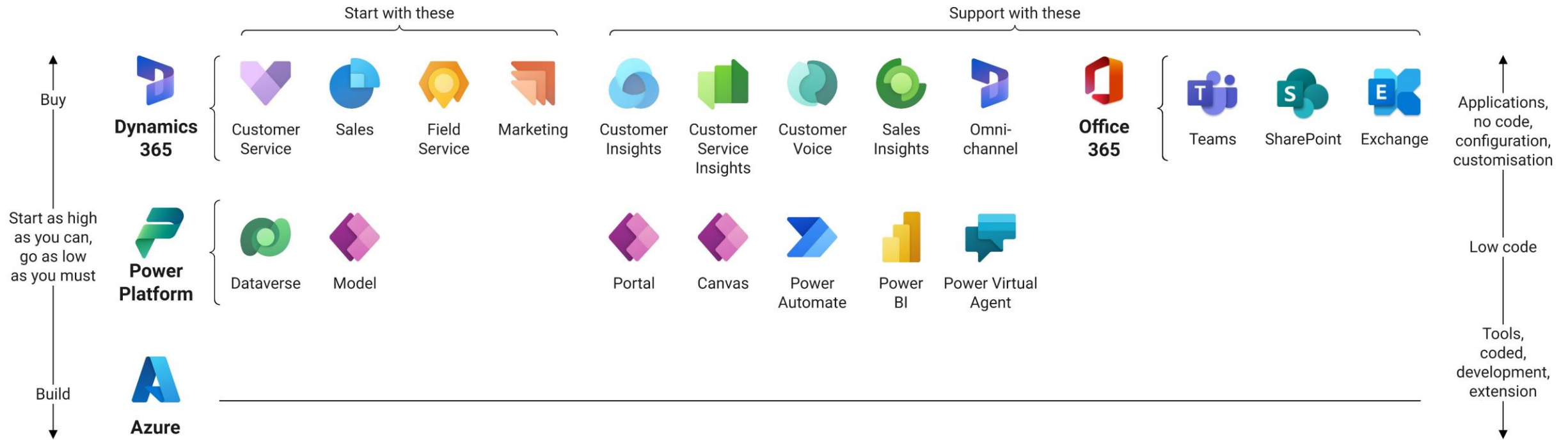


Strong Microsoft support



Intelligent insights and analytics

# Microsoft Dynamics 365 Eco System



# Dynamics 365 Eco System

Dynamics 365 — custom SANDBOX

Search

Save As | New | Set As Default | Refresh All

- Home
- Recent
- Pinned
- My Work
- Dashboards
- Activities
- Customers
  - Accounts
  - Contacts
- Sales
  - Leads
  - Opportunities
  - Competitors
- Collateral
  - Quotes
  - Orders
  - Invoices
  - Products
  - Sales Literature
- Marketing

### Members

#### Active Contacts

Contacts by Role

Role	Count
(blank)	445

#### Active Contacts

Contacts by Account

Company Name	Count
(blank)	99
Contoso, Ltd.	30
Humongous Insurance	15
Anderson Household	11
Galloway Household	8
Hair Household	8
Ulmer Household	4
Lauer Household	4
Costa Household	4
Adventure Works Cycles	3
First Up Consultants	3
Margie's Travel	3
Northwind Traders	3
School of Fine Art	3
Trey Research	3
Wide World Importers	3
Contoso Pharmaceuticals	3
Text Company	3
Julie's Vets	3
Buzzbean	3
Camilo	1
Mitloo	1
Jabbertype	1
Esdel	1
Skriptube	1
LiveZ	1
Zooxo	1
Vonlia	1
Realcube	1
Dabjam	1
Meem	1
Snappags	1
Lazz	1
Vipe	1
Realcube	1
Zava	1
Silajip	1
Phonolot	1
Browseblab	1
Linklinks	1
Jaxspan	1
Derpulse	1
Zooxoo	1
Company ABC	1
Contoso Consulting GB	1

#### Active Transactions

+ New | Delete | Refresh

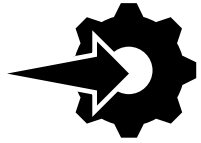
Filter by keyword

Name ↑ | Amount ↓ | Book Date ↓ | Received Date ↓

# **Challenges – Trade unions**

Challenges Incremental see within the Trade Union space

# Challenges - Trade unions



Lack of an integrated solution across the organisation, siloed processes, siloed data



Manual effort required in majority of processes, causing bottlenecks



Legacy systems, no longer fit for purpose



Inability to integrate with modern day applications



Inability to track and store key membership and contact data



Inability to process and centralise membership fee data



Providing an external facing platform



Lack of automation of processes



# Challenges - Trade unions



Lack of consistent member experience



Cybersecurity and data governance



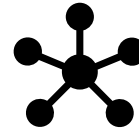
Inability to send targeted and focused comms, often blanket approach is used



Change management and user adoption



Inability to create a joining experience or self-serve help function



Centralised balloting processes



Adapting to a changing membership demographic, the “screen-first” generation

# Roadmap

## Goals

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Improved member engagement



Seamless communication channels

## Application

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- Enhancing member engagement and participation by providing digital platforms that facilitate communication, collaboration, and involvement in union activities.
- Establishing efficient and user-friendly communication channels, such as mobile apps, online portals, or social media platforms, to enable effective and real-time communication between the union and its members.

# Roadmap

## Goals

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Self-serve capabilities



Knowledge sharing and resources

## Application

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- Developing self-service capabilities that empower members to access information, update their details, and perform various transactions independently, reducing the need for manual intervention and administrative overhead.
- Creating a centralized digital repository of resources, documents, and educational materials that members can easily access, promoting knowledge sharing and skill development within the union.

# Roadmap

## Goals

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Online voting and survey tools



Event management and planning

## Application

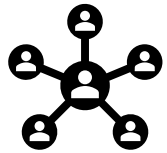
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- Implementing secure online voting systems for member polls, elections, and surveys, streamlining the decision-making process and increasing member participation.
- Offering digital event management solutions that enable seamless registration, tracking attendance, and managing events such as conferences, workshops, or training sessions

# Roadmap

## Goals

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Collaboration and networking



Advocacy and campaign management

## Application

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- Enabling digital collaboration spaces where members can connect, share ideas, and collaborate with each other, fostering a sense of community and solidarity within the union.
- Leveraging digital platforms to plan and execute advocacy campaigns, enabling members to support causes, raise awareness, and influence public opinion or policy decisions.

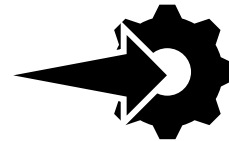
# Non-functional aspects



Training



Security



Integrations

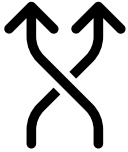


Reporting

# **Dynamics Licensing**

How is Dynamics licensed?

# Dynamics 365 Licensing Model



Flexibility



Cost-effective



Scalability



Cloud-based



Regular updates and enhancements



Customisable solution



Efficient and cost-effective



# Contact Us

To hear more about the work we do at Incremental or to avail of a free 30-minute consultancy call, please reach out to Simon or myself on,

- [Graeme.Donnell@incrementalgroup.co.uk](mailto:Graeme.Donnell@incrementalgroup.co.uk)
- [Simon.Farrell@incrementalgroup.co.uk](mailto:Simon.Farrell@incrementalgroup.co.uk)

Q&A

# Mobilisation

**Initiate**  
Project management systems  
and processes established

**Plan and prepare**  
The project team plan and  
prepare for upcoming activities

**Kick-off with stakeholders**  
If required, onboard wider  
stakeholders into the project

**Senior stakeholder meeting**  
Communications between  
Incremental and customer  
senior stakeholders established

**Handover and onboarding**  
Project and knowledge shared  
between teams

**Kick-off with project team**  
Project teams meet to plan and  
prepare



# Discovery

